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100 RELEVANT FACTS FROM THE REGIONAL ENERGY DEBATE

X ENERGY WEEK

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Latin American and Caribbean Energy Organization (OLACDE)

Andrés Rebolledo Smitmans
Executive Secretary

Gastón Siroit
Technical Advisor

Authors
Gastón Siroit
Anabella Ruiz
Clarisa Proietti
Augusto Storani

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Edition: **Angel Bastidas**

Contact OLACDE

Avenida Mariscal Antonio José de Sucre N58-63 and Fernández Salvador,
OLACDE Building – Sector San Carlos
Quito – Ecuador
Phones: (593 - 2 2598 -122 / 2531-674)
www.OLACDE.org

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INTRODUCTION

The energy debate in Latin America and the Caribbean (LAC) has become a point of reference to understand how the region imagines its own development in an increasingly demanding global scenario. The Energy Week 2025, held in Santiago, brought together a diverse community of energy authorities, leaders and specialists from the private sector, public policy makers, representatives of industry and transport, academics and social actors who, from complementary perspectives, discussed the elements that will shape our decisions in the coming decades.

The 100 pieces of data that make up this document capture key statements from panelists who participated in the discussions, organized around four essential areas: the transformation of the electricity sector; the role of natural resources in energy security and transition; trends that reconfigure demand and its decarbonization; and the centrality of socio-environmental approaches in any long-term strategy. Each of these areas shows lively debates, emerging consensuses and legitimate tensions that enrich regional reflection.

In a context marked by climate urgency, the need to expand access and the pressure to remain competitive, having a shared vision and up-to-date data is more necessary than ever. This compendium seeks to collaborate with this debate, provide clarity and perspective in that collective effort.

ELECTRICITY SECTOR

GENERATION

The long-term vision for LAC projects a fundamentally renewable energy matrix. It is estimated that by 2030, 80% of the installed capacity in the region will come from clean sources (OLACDE) including the emerging role that hydrogen will play (Jaime Sighetti, McKinsey & Company)

This projection is not merely speculative, but is based on the leadership already demonstrated by regional powers. Brazil, for example, not only exceeds the regional average of renewables (70%), but already exceeds the 2050 target, reaching 88% in its current energy matrix. It is essential to highlight that this leadership is not based only on traditional sources, but on active diversification, where approximately 30% of its total generation already comes from wind and photovoltaic sources (Leandro Pereira de Andrade, Ministry of Mines and Energies of Brazil).

SOLAR

The regional agricultural sector is consolidating as a fundamental pillar in the energy transition, demonstrating a remarkable synergy with solar generation that simultaneously addresses productivity and sustainability challenges. A key case study in Chile this year reveals that agriculture already concentrates an impressive 42% (170 MW) of all the installed power under the Distributed Generation Law (Netbilling), evidencing a high and strategic adoption of solar technology (Camila Vásquez, Ministry of Energy of Chile).

At the same time, this advance is not only energy, but also scientific and environmental. Specific research on agrovoltaics in horticulture confirms its direct benefits in the management of water resources: microclimate studies show a reduction in potential evapotranspiration by 31% and a maintenance of soil moisture by 29% higher (Frederik Schonberger, Fraunhofer Chile). This integration optimizes the land, generates clean energy, and protects vital resources.

WIND

The expansion of wind energy in LAC presents a notable market concentration outlook. In 2024, of the 4,782.5 MW of new installed capacity, 99% was located in just five countries, underscoring a significant gap in regional adoption of this technology. Leadership is clearly defined, with Brazil accounting for the majority (68%) of new capacity, followed by Chile (13%) (Ramón Fiestas, GWEC).

GEOTHERMAL

Geothermal energy exhibits a consolidated leadership in Mexico, which is positioned as the benchmark in Latin America with almost 1 Gigawatt (GW) of installed capacity. This development is complemented by a robust HUB in Central America, where the significant capacities of Costa Rica (260 MW), El Salvador (217 MW) and Nicaragua (160 MW) stand out (David Vilar, World Bank).

El Salvador, in particular, demonstrates a clear ambition for expansion, with concrete plans to add approximately 90 MW in the medium term (through the Chinameca and San Vicente plants, plus repowerings) and an estimate of additional potential reaching 600 MW (Marlene Jamilet Elías de Quan, LAGEO).

This Central American dynamism contrasts with the situation in South America. Chile, for example, has a massive explored potential of 3,800 MW (equivalent to 10% of its total installed capacity), but its current development is limited to the Cerro Pabellón plant (83 MW), the only one in operation in the subcontinent (Dafne Pino, Chile's Ministry of Energy).

HIDROPOWER

Hydropower, a historical pillar of the Latin American and Caribbean (LAC) matrix, faces a critical juncture that requires strategic decisions. Their share of total generation has declined markedly, falling from 61% in 2000 to 42% in 2024. This readjustment of their dominance is combined with an imminent infrastructure challenge: more than 50% of the region's power plants have exceeded their 30-year useful life. Addressing this obsolescence represents a major financial and political challenge, estimated at more than 33 billion dollars necessary for the modernization of the hydroelectric park in the next decade (Arturo Alarcón, IDB).

BIOENERGY

Bioenergy, especially that derived from the sugar industry, is consolidating as an energy pillar thanks to quantum leaps in efficiency. The case of Guatemala is paradigmatic: cogeneration plants not only use 100% of their biomass, but have also multiplied their efficiency by 10, going from 17 kWh to 170 kWh per ton of cane bagasse, with the potential to exceed 200 kWh. This technical advance has a direct impact on the national matrix, providing 30% of electricity in the dry season (Jacqueline Hazbun, ACI).

In the Caribbean region, biomass shows similar strategic penetration. Belize stood out in 2023 for generating 33.4% of its total electricity from this source, which already represented 42% of its Total Primary Energy Supply in 2022. For its part, Cuba has the largest installed capacity of electrical bioenergy in the subregion, with 440 MW in 2023 (8.19% of its total capacity), also coming mostly from the sugar industry (OLACDE).

TRANSMISSION

Transmission and interconnection infrastructure modernization is not an option, but an economic urgency for Latin America. Currently, it is estimated that the region wastes 7 billion dollars per year in energy per dump, a figure that shows the critical need for efficient networks (Fernando Monteverde, SIEMENS energy).

The economic incentive to solve this inefficiency is massive. Full regional integration is projected to generate savings of 10 billion dollars annually by 2035 (Rodrigo Moreno, ISCI). This potential is not only in the future; by optimizing only the existing infrastructure in the Southern Cone, energy exchanges could already generate immediate savings of approximately 2 billion dollars a year (Marcelino Madrigal, IDB).

To manage this integration and renewable variability, storage (BESS) is the linchpin. The region has started this path with an installed capacity of 1.68 GW and an estimated investment of 1.8 billion dollars (Medardo Cadena, OLACDE). This local development aligns with a global explosion of the sector, where the market is expected to reach between
120 and 150 billion dollars in 2030, with an annual growth of 29% for industrial-scale systems (Manlio Coviello, ENERGY DOME).

Regional adoption is exceeding the most optimistic expectations. The target of 2,000 MW set for 2030 already has 55% compliance, and impressively, it is projected that

the long-term goal (6,000 MW by 2050) will be reached in advance by mid-2027 (Felipe Riveros, Huawei Digital Power).

This accelerated pace materialized in concrete projects, such as the award of 667 MW for storage in Greater Buenos Aires under the AlmaGBA tender (Esteban Van Dam, Aires Renewables) and the potential identified in the Caribbean to install 9,000 MW of renewables and batteries intended to displace fossil generation (Ramiro Gómez Barinaga, RELP).

DISTRIBUTION

The distribution sector faces a long-standing structural challenge in terms of efficiency. Regional data indicate that the average level of losses has remained stagnant between 16% and 17% over the last four or five decades (OLACDE). This technical stagnation coexists with critical coverage gaps, exemplified by the situation in Haiti, which maintains the lowest access rate in the Caribbean, reaching only 45% of the population in 2022 (OLACDE)

To these historical challenges are added new demands for quality and resilience. In Chile, for example, the current indicator exceeds 20 hours of annual interruption, a figure distant from the Energy Policy goals that seek to reduce it to 4 hours by 2035 and only one hour by 2050 (Juan Meriches, Empresas Eléctricas AG). This vulnerability of the network becomes critical in the face of the new global climate paradigm, where between 2014 and 2023 there were 4,000 climate events with associated economic losses reaching 2 trillion dollars, demanding an infrastructure capable of withstanding this scenario (Gianluca Palumbo, ENEL Chile).

NATURAL RESOURCES

OIL

Lac is redefining its position on the global energy map, presenting a remarkable paradox. Although its current production is modest, contributing 9.8% of global oil and 4.9% of gas production in 2023, the region has become the main focus of exploration. Between 2020 and 2024, the region accounted for 38% of global hydrocarbon discoveries (Carlos Garibaldi, ARPEL).

This exploration boom is highly concentrated geographically, as 83% of the resources discovered since 2020 are located in Brazil, Guyana and Suriname. This activity places the Atlantic as the central axis of the new global offer, given that the margins of LAC and Africa together contributed 60% of the global findings in that period (Carlos Garibaldi, ARPEL).

This intensive search responds to strategic energy security needs. The case of Uruguay illustrates this economic logic, where oil imports represent 15% of all foreign purchases in the country, justifying the exploration of own resources to strengthen the system (Cecilia San Román Ribolla, ANCAP). In contrast, fossil dependence in the Caribbean shows a critical vulnerability, where 80% of energy comes from these sources, implying high costs and less security for the population (Isabel Beltrán, GEAPP).

GAS

The debate on natural gas has urgently refocused on its main externality: methane emissions. Scientifically, this gas is 82.5 times more potent than CO_2 over a 20-year horizon (Aminta Estrada, SEI), making it the fastest and most effective mitigation target. The political payoff for acting is enormous, as the Global Methane Commitment would allow for a 0.3 degree reduction in temperature by 2050, and a well-implemented global standard could avoid close to 2 trillion dollars in annual climate damage (Marcelo Mena, Global Methane Hub).

Along the same lines, for the region this represents a profitable efficiency opportunity. It is estimated that more than 50% of methane mitigation can be done at zero cost. Specifically in the oil and gas sector, negative cost mitigation would represent a reduction of 319 Mt CO_2e, a volume equivalent to almost Argentina's annual emissions (Cristina Lobillo, European Commission).

At the operational level, gas maintains a structural role, especially in Chile. There it is projected that by 2025 it will have a 19% stake in the electricity matrix (Edgar Blanco, GasAndes Pipeline). This matrix is supported by robust infrastructure, such as the Mejillones terminal that has the largest LNG tank in South America with 187,000 m³ of capacity (Belén Aravena Riquelme, ENGIE). The replacement of this system represents a major economic challenge, estimated at more than 26 billion dollars if it were sought to eliminate natural gas from the matrix by 2035 (Carlos Cortes Simón, AGN).

However, the commercial rigidity of this resource generates frictions in the transition. In Central America, inflexible gas contracts (*take or pay*) generate uncertainty in the renewable sector, since they legally force a thermal dispatch that causes the dumping of clean energy (Silvia Zumarraga, WÄRTSILÄ).

MINING

LAC is consolidated as the indispensable geographical epicenter for global electrification, thanks to a strategic advantage: it concentrates 60% of the world's lithium resources and more than 45% of copper and silver production. Given the explosion in demand, it is projected that regional lithium production will multiply by at least 10 in the next 20 years, while copper production will have to double by 2050 (Ricardo Michel, SELA).

This increase responds to a critical global need, since the planet will need 70% more copper by 2050, which is equivalent to an additional 10 million tons (Rodrigo Darquea, BHP). This potential already acts as a capital magnet, capturing 31% of all Foreign Direct Investment to the region in the natural resources sector (Diego Rodríguez, AMI).

However, this vital production faces severe climate vulnerability. Global energy security depends on the resilience of the region, given that almost 7% of the world's copper supply is at risk of disruption due to extreme weather events such as floods or droughts (Mary B. Warlick, IEA).

ENERGY DEMAND

INDUSTRY

Industrial decarbonization is emerging as the priority challenge for the region, given that this sector generates 20% of CO2 emissions in Latin America, with 70% of that figure coming from heavy industry (Ludmila de Oliveira Diniz, UNIDO). Even in countries with renewable electricity matrices such as Uruguay, 35% of the primary energy matrix still depends on fossil resources, mainly destined for industry and transport (Cecilia San Román Ribolla, ANCAP).

In terms of competitiveness, efficiency is confirmed as a development lever. Investing in energy efficiency can enable an increase in production capacity of between 20% and 30% without the need to increase energy consumption, thus overcoming supply limitations (Andrea Heins, UNEP).

DECARBONIZING DEMAND

Heavy industry requires specific technological solutions. In the steel sector, where more than 8 billion dollars have already been invested in the transition, the route is clear towards production by electric furnaces, which have up to 10 times less environmental impact than the traditional blast furnace (Ezequiel Tavernelli, ALACERO).

Meanwhile, the mining sector is a high-intensity consumer that demands 8% of the total energy in the region, a figure that amounts to 37% if we consider only the markets of Peru and Chile (Gastón Siroit, OLACDE).

For this sector, self-consumption models such as solar PPAs allow to achieve savings of at least 30% in energy costs, facilitating a cost-effective decarbonization (Soledad Ramírez, Banco Santander).

THE NEW DEMAND AND THE HYDROGEN SOLUTION

The future of industrial demand is shaping up with new vectors. On the one hand, a new type of intensive consumer emerges: data centers. These currently consume 30 terawatt hours (TWh) and are projected to quadruple their consumption in the next 10 years (Fernando Monteverde, SIEMENS energy).

At the same time, clean hydrogen stands as the solution for sectors that are difficult to deplete. Latin America and the Caribbean produces about 4 million tons of grey hydrogen per year, which opens an immediate opportunity for internal substitution (Marina Gil, ECLAC). Simultaneously, European demand drives exports, since by 2030 at least 42% of the hydrogen used in EU industry must come from electrolysis (Dario Bove, University of Genoa).

TRANSPORT

SUSTAINABLE MOBILITY

The transition to sustainable mobility in Latin America and the Caribbean exhibits remarkable market momentum, rated by the industry as a success in adoption. Sales of electric vehicles are particularly high, highlighting countries such as Uruguay (30%), Costa Rica (29%) and Colombia (28%) (Guillermo Areas, BMW Group).

This sales trend is consistent with a high level of public acceptance, as the positive perception reaches 77% in Colombia and Costa Rica, 75% in Ecuador and Peru, and 71% in Chile. This willingness to adopt not only responds to an environmental awareness, but to the fundamental social role that mobility plays in the region: 81% of people associate it with access to better job opportunities and 62% with educational opportunities. However, critical barriers persist for the user, the two main ones being the purchase price and the insufficiency of the charging network (Laura Viegas, Inchcape Americas).

Parallel to the advancement of electromobility, long-standing solutions such as biofuels demonstrate their structural economic and environmental impact. Brazil's program, for example, has avoided the emission of 1,640 million tons of CO2 equivalent and has generated savings of 251 billion dollars in fossil fuel imports (Heloisa Borges, EPE Brazil).

MARITIME DECARBONIZATION

Shipping, which accounts for 3% of global CO2 emissions (Alexis Rodríguez, Maersk), is a strategic sector in regions with vital logistics arteries. In South America, the Paraguay-Paraná waterway is a central axis: it is a waterway of
4,000 km that connects five countries, mobilizes 23 million tons of cargo per year and presents an annual growth projection of 5% (Raúl Podetti, Independent Consultant)

Addressing emissions in this sector is not only an environmental necessity, but a business opportunity. Case studies in the Buenos Aires region on dredging operations indicate that the use of LNG combined with locally produced bio-LNG can reduce operating costs by 15%, thanks to the fuel price differential compared to traditional fossils (Raúl Podetti, Independent Consultant).

AIR TRANSPORT AND SAF

The airline sector faces a monumental financial challenge on its path to net-zero emissions, with an estimated global transition cost of 4.7 trillion dollars (Juan José Toha, LATAM Airlines). The key lever for this process, Sustainable Aviation Fuel (SAF), presents a remarkable cost variability in the region: while in Brazil a cost per liter of 1.1 USD is estimated, in Chile (for Power-to-Liquids technology) it amounts to 2.04 USD (Ángelo Gurgel, MIT).

Faced with this productive disparity, political strategy becomes fundamental. Models indicate that regional integration in the adoption and supply of SAF could reduce the impact on aviation demand by 40%, significantly mitigating the economic blow of the transition (Angelo Gurgel, MIT).

RESIDENTIAL / COMMERCIAL

The decarbonization of the residential and commercial sector requires a paradigm shift towards active demand management. In this context, energy efficiency is positioned as the most cost-effective resource, with a systemic economic impact where the potential for energy efficiency savings in LAC could reach up to 18 billion dollars (Stéphanie Nour, Econoler).

However, capturing this value and effectively integrating distributed generation require accelerated digitization of the grid, an area where the region has a significant infrastructure lag. The case of Brazil illustrates this technological gap with 88 million users connected to the system, it has less than 2 million smart meters currently installed. To correct this asymmetry and enable the residential transition, public policy has established clear regulatory goals, the government seeks that each distributor reaches 40% of its market with smart meters in 10 years (Joisa Dutra, FGV CERI).

SOCIO-ENVIRONMENTAL APPROACH TO ENERGY

ACCESS

Universal access to electricity persists as a fundamental societal challenge in Latin America and the Caribbean. As of October 2025, 17 million people in the region still lack this basic service (Lisnely Valdés Bosquez, National Energy Secretariat of Panama).

Brazil's “Light for All” program is the most relevant case study on the magnitude of this challenge: in the last 20 years, the program managed to connect 20 million people (almost 4 million residences) with an investment of 4.5 billion dollars. However, despite this massive success, there are still approximately 1.3 million people without electricity in the country, evidencing the enormous technical and economic difficulty of the so-called "last mile", which is mostly concentrated in rural and remote areas of the Amazon (Gustavo Cerqueira Ataide, Ministry of Mines and Energy of Brazil).

GENDER

The gender gap in the energy sector is significant. Globally and regionally, the female presence does not exceed 30% (Verónica Barzola, AMES). This structural imbalance appears to be rooted in early stages of training: data from PISA assessments reveal that only 16% of women (around the age of 15) express interest in pursuing stem careers (Florencia Balestro, World Bank).

EMPLOYMENT AND VALUE CHAINS

The energy transition is shaping up to be a net driver of job creation in the region. The ILO has estimated that the transition could create 15 million new jobs in Latin America and the Caribbean by 2030, a figure that more than compensates for the estimated loss of 7.5 million in fossil fuel-dependent sectors (Patricia Roa, ILO).

This potential is already attracting foreign capital on a large scale. In 2023, 43.1% of total investment from China to South America went to the energy sector, with a clear focus on renewable sources (Ricardo Michel, SELA). Multilateral development banks are also a pillar, as evidenced by the 3.5 billion dollars approved by CAF in the last two and a half years to accompany Chile's decarbonization policy (Jorge Srur, CAF). However, investment volatility is a political challenge: H1 2025 was the lowest semester for renewables investment in LAC since late 2021 ($13.1 billion), underscoring the need for stable frameworks (Ramón Fiestas, GWEC).

In this context, regional integration emerges as the main strategy to optimize investments and develop local value chains. This dynamic is already a reality in countries such as Brazil, where almost 40% of all energy agreements signed are with South America, positioning Argentina as its main global partner in the field (Astrid Cazalbón, Latin American Observatory of Energy Geopolitics). The benefits of this integration are tangible in the labor market: a model for the Caribbean, which combines regional LNG and biogas resources, estimates that it could generate savings of 600 million dollars and the creation of 90,000 jobs (Raúl Podetti, IDB Consultant).

This integration strategy is urgent in the face of a double existential risk. First, the cost of climate inaction, given that the annual economic impact of disasters in the energy and transport sectors is already estimated at 18 billion dollars (Ricardo Michel, SELA). And second, the historical economic stagnation, evidenced by an annual productivity in Latin America that grew at an alarming 0.01% in the last 50 years, in sharp contrast to the 2.1% recorded in Southeast Asia (Diego Rodríguez, AMI).

THE REGION AND ITS ENERGY TRANSITION

Analysis of the data reveals that Latin America and the Caribbean is not just another player in the global energy transition; it is the central scenario where tensions, resources and opportunities converge. The region is experiencing a profound paradox: while consolidating itself as the world's main *hotspot* for new hydrocarbon discoveries, it simultaneously possesses the reserves of critical minerals (lithium and copper) and the renewable potential (solar, wind, geothermal) essential for the decarbonization of the planet. This dual role, being the source of the old and the new energy, defines the direction and the bargaining lever of the region for the coming decades.

The data show that transition is not an ideological choice, but an economic imperative. The historical stagnation of regional productivity (0.01% per year, according to Diego Rodríguez, AMI) and the present cost of inaction (18 billion dollars per year in disaster losses) make the current model unfeasible. In contrast, transition is presented as the only viable industrial policy, with the capacity to create 15 million new jobs (Patricia Roa, ILO), generate multi-billion savings for efficiency and resilience, and attract large-scale green investment capital.

However, the analysis also identifies structural gaps that threaten this potential. Inefficiency and losses in transmission and distribution (a dumping loss of 7 billion dollars annually, according to Fernando Monteverde, SIEMENS Energy), fossil dependence in the Caribbean, the difficulty in decarbonizing heavy industry, and the vulnerability of mining infrastructure to climate change are the critical challenges. The data is clear: the challenge of LAC is not the generation of clean energy, but its management, transport and intelligent integration.

The direction, therefore, is not defined by the lack of resources, but by the urgency of making political decisions. Regional integration emerges as the primary strategy to dilute costs, optimize infrastructure, and create value chains. Latin America and the Caribbean must capitalize on its role as a "solution region", using its leverage in critical minerals and clean energy, not only to export *commodities*, but to finance the modernization of its own infrastructure, close its social gaps and finally build a resilient and productive economy.

ABBREVIATIONS

ACI: Association of Independent Cogenerators

AGN: Natural Gas Association

ALACERO: Latin American Steel Association

LAC: Latin America and the Caribbean

AMES: Association of Women in Energy

AMI: Americas Market Intelligence

ANCAP: National Fuel, Alcohol and Portland Administration

ARPEL: Regional Association of Companies in the Oil, Gas and Biofuel Sector in Latin America and the Caribbean

BESS: Battery Energy Storage System

IDB: Inter-American Development Bank

CAF: Development Bank of Latin America and the Caribbean

ECLAC: Economic Commission for Latin America and the Caribbean

EPE: Energy Research Company (Brazil)

GEAPP: Global Energy Alliance for People and Planet

GW: Gigawatt

GWEC: Global Wind Energy Council

IEA: International Energy Agency

ISCI: Engineering Complex Systems Institute

LAGEO: LaGeo S.A. de C.V.

MIT: Massachusetts Institute of Technology

MW: Megawatt

ILO: International Labour Organization

OLACDE: Latin American and Caribbean Energy Organization

UNIDO: United Nations Industrial Development Organization

SEI: Stockholm Environment Institute

SELA: Latin American and Caribbean Economic System

UNEP: United Nations Environment Programme

SPEAKERS

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Marlene Jamilet Elías de Quan. (LAGEO).

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Soledad Ramírez. (Banco Santander).

Verónica Barzola. (AMES).

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